

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Citrus Annual 2013

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Citrus

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Report Highlights:

Italy's MY 2013/14 (November/October) orange production is forecast to go back to MY 2011/12 levels thanks to favorable weather. Italy's MY 2013/14 (November/October) lemon production is forecast to be excellent in terms of both quantity (+31 percent compared to the previous campaign) and quality (especially the *Primofiore* variety). Fruit grades are forecast to be good.

Oranges

Table 1: Production, Supply, and Demand (MT)

Oranges	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Area Planted	101,498	99,836	100,020
Area Harvested	99,569	98,029	98,900
Production	2,020,000	1,730,000	1,935,000
Imports	178,151	208,405	181,200
Total Supply	2,198,151	1,938,405	2,116,200
Exports	114,298	105,400	117,900
Fresh Dom. Consumption	1,793,853	1,524,005	1,652,700
For Processing	290,000	309,000	345,600
Total Distribution	2,198,151	1,938,405	2,116,200

Sources: Italian industry; ISTAT (Italian National Institute of Statistics), GTA (Global Trade Atlas)

PRODUCTION

Italy's MY 2013/14 (November/October) orange production is forecast to go back to MY 2011/12 levels thanks to favorable weather. Production of red oranges is forecast to register an increase of 17 percent (1,415,000 MT) compared to the previous season (1,203,000 MT). Fruit quality is forecast to be good except for those plants affected by the citrus tristeza virus (CTV). A shortage of big size (size $\frac{3}{4}$) is foreseen, as there will be more small size oranges. Sicily and Calabria are the main orange-producing areas, accounting for 59 and 22 percent respectively. *Tarocco*, *Moro*, *Sanguinello*, *Naveline*, and *Valencia* are the chief varieties grown in Italy.

CONSUMPTION

Italy's MY 2013/14 orange consumption is forecast to increase by approximately 8 percent driven by the increased production. Most oranges are consumed fresh. Blood varieties (*Tarocco*, *Moro*, and *Sanguinello*) are used mainly for fresh consumption. Late varieties (*Ovale* and *Valencia*) are destined to both fresh market and processing industry.

TRADE

In MY 2011/12, Italy exported 114,298 MT of oranges, mainly to Germany (35,140 MT), Austria (16,194 MT), and Switzerland (15,682 MT). Italy's MY 2011/12 orange imports reached 178,151 MT, mainly from Spain (117,338 MT) and South Africa (30,599 MT).

Orange Juice

Table 2: Production, Supply, and Demand (MT)

Orange Juice	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Delivered to Processors	290,000	309,000	345,600
Production	20,300	21,630	24,192
Imports	16,150	16,000	14,885
Total Supply	36,450	37,630	39,077
Exports	36,000	37,130	38,477
Dom. Consumption	450	500	600
Total Distribution	36,450	37,630	39,077

Sources: Unofficial estimates based on Italian industry; GTA

According to latest estimates, Italy is forecast to process about 345,600 MT of oranges in MY 2013/14 to produce 24,192 MT of concentrate. The total volume of oranges channeled to processing depends on crop quality and quantity of oranges destined for the fresh market, both domestic and foreign.

Tangerines

Table 3: Production, Supply, and Demand (MT)

Tangerines	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Area Planted	38,338	38,135	38,250
Area Harvested	37,102	37,020	37,070
Production	739,000	792,000	760,000
Imports	95,381	90,541	90,150
Total Supply	834,381	882,541	850,150
Exports	116,831	84,500	81,100
Fresh Dom. Consumption	673,550	745,041	718,150
For Processing	44,000	53,000	50,900
Total Distribution	834,381	882,541	850,150

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2013/14 tangerine production is forecast to slightly decrease by 4 percent compared to the previous season. Italy's tangerine production consists of over 80 percent seedless clementines and nearly 20 percent mandarins. Italy's MY 2013/14 clementine production is forecast to register an 8 percent drop (615,000 MT compared to 670,000 MT in 2012/13), while mandarin production is forecast to grow 18.8 percent (145,000 MT) compared to the previous season (122,000 MT). Quality is forecast to be satisfactory for both clementines and mandarins (especially the *Avana* and *Ciaculli* varieties). Calabria, Sicily, and Apulia are the main tangerine-producing areas, accounting for 50, 23, and 14 percent respectively. *Comune* or *Oroval*, and *Monreal* are the leading clementine varieties grown in Italy. *Avana* and *Tardivo di Ciaculli* are the main mandarin varieties.

CONSUMPTION

Italy's MY 2013/14 tangerine consumption is forecast to slightly decrease by 3.6 percent compared the previous season. Most tangerines are consumed fresh. Italians consume large quantities of clementines and mandarins during winter holidays when the bulk of production hits the market.

TRADE

In MY 2011/12, Italy exported 116,831 MT of tangerines, mainly to Poland (28,278 MT), Romania (10,880 MT), Hungary (10,663 MT), Germany (8,426 MT), and Slovenia (8,203 MT). Italy's MY

2011/12 tangerine imports reached 95,381 MT. Spain is the leading supplier to the Italian tangerine market, representing 87 percent (82,914 MT) of total imports.

Lemons

Table 4: Production, Supply, and Demand (MT)

Lemons	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Area Planted	28,628	28,200	28,260
Area Harvested	24,348	24,100	24,140
Production	458,000	415,000	545,000
Imports	110,753	107,493	100,200
Total Supply	568,753	522,493	645,200
Exports	38,313	29,000	38,500
Fresh Dom. Consumption	445,440	427,493	519,200
For Processing	85,000	66,000	87,500
Total Distribution	568,753	522,493	645,200

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2013/14 (November/October) lemon production is forecast to be excellent in terms of both quantity (+31 percent compared to the previous campaign) and quality (especially the *Primofiore* variety). Fruit grades are forecast to be good. Sicily produces more than 86 percent of Italy's lemons. Lemon-producing area is progressively decreasing: higher input costs and lower prices have negatively affected crop profitability. *Femminello Commune* (F. *Zagara Bianca*, F. *Siracusano*, F. *S.Teresa*), *Monachello*, and *Interdonato* are the main lemon varieties grown in Italy.

CONSUMPTION

Italy's MY 2013/14 Italian lemon consumption is forecast to grow 21.4 percent compared to the previous season. Italy's lemon production is mostly destined for the fresh market.

TRADE

In MY 2011/12, Italy exported 38,313 MT of lemons, mainly to Germany (13,422 MT), Greece (5,680 MT), and Austria (4,584 MT). Italy's MY 2011/12 lemon imports reached 110,753 MT, mostly from Spain (51,635 MT) and Argentina (37,574 MT).

Grapefruits

Table 5: Production, Supply and Demand (MT)

Grapefruits	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Area Planted	303	312	315
Area Harvested	253	262	265
Production	7,100	7,500	10,000
Imports	28,050	27,860	26,800
Total Supply	35,150	35,360	36,800
Exports	1,935	2,000	2,200
Fresh Dom. Consumption	33,215	33,360	34,600
For Processing	0	0	0
Total Distribution	35,150	35,360	36,800

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2013/14 (November/October) grapefruit production is forecast to rise 33 percent compared to the previous season thanks to favorable weather.

CONSUMPTION

Italy's MY 2013/14 grapefruit consumption is forecast to register an increase of 3.7 percent compared to the previous campaign.

TRADE

In MY 2011/12, Italy exported 1,935 MT of grapefruits, mainly to France (549 MT) and Slovenia (444 MT). Italy's MY 2011/12 grapefruit imports reached 28,050 MT, mainly from South Africa (8,994 MT) and Israel (6,532 MT).

Abbreviations and definitions used in this report

MY Marketing year

Oranges, Tangerines, Lemons, Grapefruit, Orange Juice: November/October

HS Codes

Oranges: 080510
Tangerines: 080520
Lemons: 080550
Grapefruit: 080540
Orange juice: 200911-200912-200919

MT Metric ton = 1000 kg
Ha hectare; 1 ha = 2.471 acres
EU European Union